

High impact ways to  
improve your win rate:

Over 40 critical truths  
about defining  
**proposal quality**  
and developing  
criteria to assess it

Plus 10 links where you can get more  
information





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# Welcome...



**Carl Dickson**

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**Note:** There was no registration form to get this file and I won't be calling to sell you something. But if you'd like to keep in touch, please sign up for the newsletter I publish. You can do this by visiting PropLIBRARY (<https://proplibrary.com>).

Since 2001, I have published over a thousand articles on business and proposal development.

This document is not like any of them.

If you want process, methodology, structure and training, you should visit PropLIBRARY and read those articles.

If you want deep insight to ponder that's a little too honest and bordering on insubordinate, keep reading. I'm going to share what I've learned about what matters the most from doing all that writing. And it's not the procedures we follow.

Take it slow. These are the conclusions I've reached. The implications are deep and worth pondering.

From the very beginning I've given away some articles for free and sold others. I freely share the theory and foundation behind the approaches I recommend. The checklists, templates, forms, and process guidance needed for immediate implementation are what I've sold as books and subscription-based resources.

If you are a do-it-yourself kind of person, you'll be able to accomplish a great deal from what I give away. If you're focused on quick implementation, then the [premium content](#) I publish is a great return on investment. And if you want my hands-on help, you can [engage me](#) as a consultant.

You are welcome to contact me if you're not sure about something I've said, or if you want to know how it might apply to your circumstances.

## Section 1:

# Understanding Proposal Quality

## Section 1 • Understanding Proposal Quality

# Does your company have a **written definition of proposal quality**?

Yeah, no one else does either.

Well hardly anyone. Some folks are paying attention to what I write.

## Section 1 • Understanding Proposal Quality

**Note:**

This is a great opportunity to achieve a  
**competitive advantage**

If you write proposals that fulfill a written definition of what a quality proposal is, while they continue to win it, you have a significant competitive advantage.

## Section 1 • Understanding Proposal Quality

# If you don't define what **proposal quality** is...

What the heck in the world *is* a great proposal? How do you know when you have one? Are you really just supposed to know? Would you tolerate that BS in any activity other than proposals?

For those who do know, that knowledge does zero good for anybody else until you define it.

*For more information on this topic:*

**What is the worst sin in proposal development?**

<https://proplibrary.com/item/174-what-is-the-worst-sin-in-proposal-writing/>

**Three reasons why your proposal reviews are failing**

<https://proplibrary.com/proplibrary/item/246-three-reasons-why-your-proposal-reviews-are-failing/>

**10 signs that it's time to reengineer how your company reviews proposals**

<https://proplibrary.com/proplibrary/item/21-10-signs-that-its-time-to-reengineer-how-your-company-reviews-proposals/>

**How should you define proposal success?**

<https://proplibrary.com/proplibrary/item/737-how-should-you-define-proposal-success/>





**It doesn't matter how you review your proposals.**

What does matter is how you define proposal quality.



## Section 1 • Understanding Proposal Quality

The reason you're getting **inconsistent results** from your reviews has nothing to do with **procedures**.

It has everything to do with each person involved having their own ideas about what defines proposal quality. Trying to find the magic formula for conducting your reviews is just beating your head against the wall.

## Section 1 • Understanding Proposal Quality

Take the time to herd your cats into a **single, common definition of proposal quality.**



It will not only impact the effectiveness of your reviews, but also what proposal writers seek to accomplish. This is how defining quality improves your win rate.

## Section 1 • Understanding Proposal Quality



If you want to succeed **with other people involved**, start by defining **success**.

How else will everyone know what you're trying to collectively create?

# But no. Companies do this instead:

- Wait until there's a draft to start thinking about it.
- Better yet, stop the presses and force the production of a fully formatted draft because we need to see it that way to start thinking about what it's supposed to be.
- Surprise the proposal team by giving them "feedback" that should have been their direction at the beginning. Only now there's not enough time to do it right.
- Force them on a death march to the deadline, with rewrite after rewrite until time runs out and you submit what you have instead of what it should have been.
- Convince yourself that the final proposal has been "improved" instead of comparing it to a definition of proposal quality.
- Sacrifice any resemblance to quality assurance in the final moments in order to process last minute "improvements" "vital" for success. People who wear that as a badge of honor should not be let anywhere near a proposal in the future.
- Then you do it all over again on the next proposal.



# Section 2:

# **Criteria Based Proposal Reviews**

## Section 2 • Criteria Based Proposal Reviews

A woman with brown hair in a ponytail, wearing a blue blazer over a white shirt, is holding a laptop that is glowing with a bright light. She has a surprised or excited expression on her face, with her mouth open and her right hand raised in a gesture. The background is a dark blue gradient with some light effects.

# Once you've defined proposal quality...

## Section 2 • Criteria Based Proposal Reviews

The next thing to figure out is what **criteria** to use to determine whether the draft **fulfills** your definition of proposal quality.

This is where things get fun.

Getting everyone on the same page regarding how to assess proposal quality is well worth it.

Arguments over what your proposal quality criteria should be are arguments worth having.

And settling.

*For more information on this topic:*

6 topics to help you define your proposal quality criteria  
<https://proplibrary.com/proplibrary/item/770-6-topics-to-help-you-define-your-proposal-quality-criteria/>

The proposal arguments we should be having  
<https://proplibrary.com/item/242-the-proposal-arguments-we-should-be-having/>



## Section 2 • Criteria Based Proposal Reviews



**If you can't articulate the criteria that define a quality proposal, you can't prepare one.**

You can't review and rewrite your way into a quality proposal.

## Section 2 • Criteria Based Proposal Reviews



If have the **luxury** of taking a moment to do something to improve your proposal process, **start here.**

## Section 2 • Criteria Based Proposal Reviews

# Your quality criteria become guidance for **both** writers and reviewers.

Written quality criteria stop reviewers from making it up as they go along and randomly pronouncing subjective claims about what leads to great proposals after the proposal has been written.

This is the only way to consistently achieve effective reviews.

But more importantly, it's the only way for writers to show up with a great proposal on the first draft.

## Section 2 • Criteria Based Proposal Reviews

Creating your quality criteria, using them to guide your writers, and then using them during reviews **is** the proposal process.

Everything else you need to do is implied by these three things.

Even if you don't have a written process, if you just do these three things you'll see a big improvement.

## Section 2 • Criteria Based Proposal Reviews

# Take a look at a random past proposal.

If it:

Has trivial themes, lacks differentiators, is about you instead of being about the customer, is merely descriptive, has no recognizable bid strategies other than your previous contracts and claims of greatness, and is written in passive voice...

It's because you lack quality criteria.



## Section 2 • Criteria Based Proposal Reviews

# **The result of not having proposal quality criteria is...**



Writers write what sounds good.

Reviewers try to improve the proposal by making it sound better.

Your working definition of a great proposal is one that sounds good to The Powers That Be.

What sounds good gets watered down by people not taking risks and sounding like everyone else.



## Section 2 • Criteria Based Proposal Reviews

# When you **lack** quality criteria...

Writers do not write to prove a point.

They write to address requirements while trying to sound good.

Reviewers do not validate the quality of the proposal.

Reviewers just read and make comments about what doesn't sound good.





## Section 2 • Criteria Based Proposal Reviews

# Writing what sounds good is not a recipe for beating all potential competitors.

It's a recipe for a **low win rate**, with occasional wins based on price while setting yourself up for ongoing declining margins...

And you don't fix this by **trying harder** to sound better.



## Section 2 • Criteria Based Proposal Reviews

# The color team model for reviewing proposals that we were all raised on **lacks quality criteria**

It's not only obsolete, it's ineffective.

It does things supposedly to improve quality in a way that no quality methodology on the planet would tolerate. Why do we tolerate it for our proposals?

We justify it by saying it's better than... nothing.

We can do better.



*For more information on this topic:*

**Whitepaper: Is the Red Team obsolete?**  
<https://proplibrary.com/item/409-whitepaper-proposal-quality-validation/>

## Section 2 • Criteria Based Proposal Reviews

# **We can do better.**

We can do better than reviewing to discover that we've already failed.

We can do better than reviewing without standards or definitions for what we are doing in reviewing.

We can do better than waiting until we're almost done to define quality.

We can do better than claiming we've achieved a quality we can't define.

We can do better than refusing to improve because it's better than the nothing we used to have.



## Section 2 • Criteria Based Proposal Reviews

# I hope my competitors continue to follow the color team model



*For more information on this topic:*

**Generic proposal reviews do not lead to winning proposals**  
<https://proplibrary.com/proplibrary/item/70-generic-proposal-reviews-do-not-lead-to-winning-proposals/>

# Section 3:

# **Proposal Quality Validation**

## Section 3 • Proposal Quality Validation



What we need instead is to **validate** the fulfillment of our quality criteria

Give your proposal quality criteria to your writers, then validate that the draft properly reflects them. This is fundamental.

## Section 3 • Proposal Quality Validation

# The number of proposal reviews and your review procedures **do not matter**

**What matters** is whether you've **validated** that you've **achieved** your **proposal quality criteria**.

This tells you what you need to know to create a superior review process.

Indeed, this one statement tells you everything you need to know to create a superior proposal process.

So quit trying to make a broken model somehow work by improving your procedures.



## Section 3 • Proposal Quality Validation



# Reviewing your quality criteria is **more important** than reviewing your draft proposal

Your quality criteria impact proposal writing before you even get to a draft review.

Your quality criteria impact how reviewers perform their review.

Your quality criteria are both what you set out to achieve, and how you know when you've achieved it. Before you've even started.

## Section 3 • Proposal Quality Validation

# This means that defining quality criteria **before you write** is vital

This is how you shift from fixing things at the back end to building quality in from the beginning.

And it doesn't take any significant effort to write your quality criteria.

All the effort goes into herding your cats into agreeing what a quality proposal is.

But try to do a proposal without that. Oooops.  
You already have.



## Section 3 • Proposal Quality Validation

# Reviewers need (re)training



Reviewers must validate the fulfillment of the quality criteria.

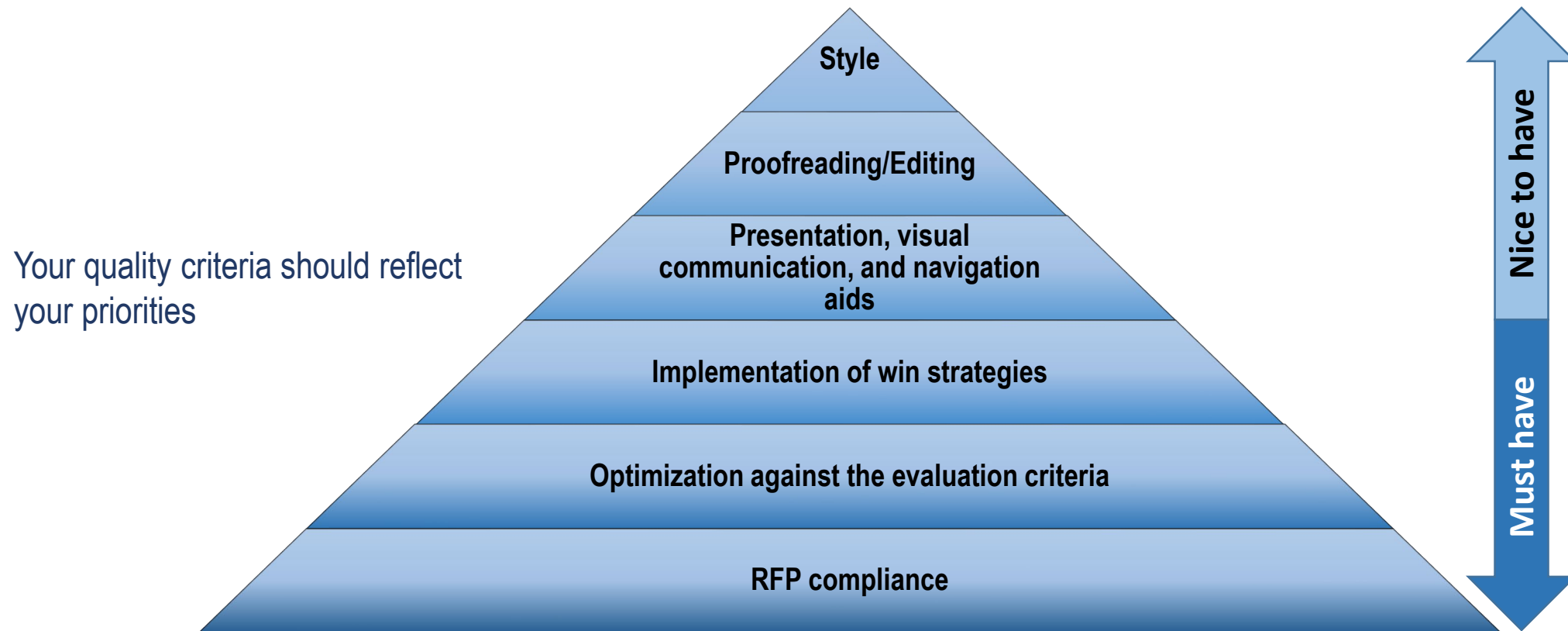
Anything else is a bonus.

To achieve quality validation, they must learn to apply the quality criteria instead of reading and commenting. You can't expect them to get this right on the first attempt without at least some training.

## Section 3 • Proposal Quality Validation

# Once fulfillment of your quality criteria is validated, **then** you can wordsmith

It's Maslow's Hierarchy of Needs applied to proposals





## Section 3 • Proposal Quality Validation

# You can still have your draft reviews



But they have a different purpose. And priority.

You don't read the draft to determine your bid strategies or offering.

You read the draft to determine if you can tweak your messages to better fulfill your quality criteria.

## Section 3 • Proposal Quality Validation

# Focusing on quality criteria can **change your entire corporate culture**

Why do we do things?

How do we know the right way to do things?

What should we look for?

What are our goals?

**Even if you don't create criteria for everything, you'll be training people to think about the right things.  
And when you do this, people will become more effective.**



## Section 3 • Proposal Quality Validation

# This gives you a new tool for **managing change** and guiding corporate culture

Want to change what people do or how they go about doing it on a proposal?

Build it into your quality criteria.

Just focus on outcomes instead of procedures.

*For more information on this topic:*

Organizational Improvement: Transforming into a winning organization

<https://proplibrary.com/proplibrary/item/699-organizational-improvement-transforming-into-a-winning-organization/>

8 specific things to do to create a winning culture

<https://proplibrary.com/proplibrary/item/700-8-specific-things-to-do-to-create-a-winning-culture/>



## Section 3 • Proposal Quality Validation



It's good to **surface differences** of opinion  
over goals and sufficiency

And it's much better to do it early instead of late.

## Section 3 • Proposal Quality Validation

# You can work on quality criteria **in between** proposals

Set up meetings on the topics and issues that impact proposal quality.

Get everyone on the same page regarding how to articulate the quality criteria.

Fight. Productively. There's no deadline.

When the RFP drops you'll have your criteria to put to work immediately.

## Section 3 • Proposal Quality Validation

# Your proposal quality criteria give you **a tangible way to apply lessons learned**

Why does every proposal lessons learned meeting seem to revolve around  
“we need people to stop making changes right up to the deadline”?

That’s not actionable.

**If you have quality criteria you can change the future by tweaking your quality criteria.**

## Section 3 • Proposal Quality Validation

# How to tell if your quality criteria are **any good**

If you produce a great proposal and nobody finds any problems that the quality criteria didn't address, you've got good quality criteria.

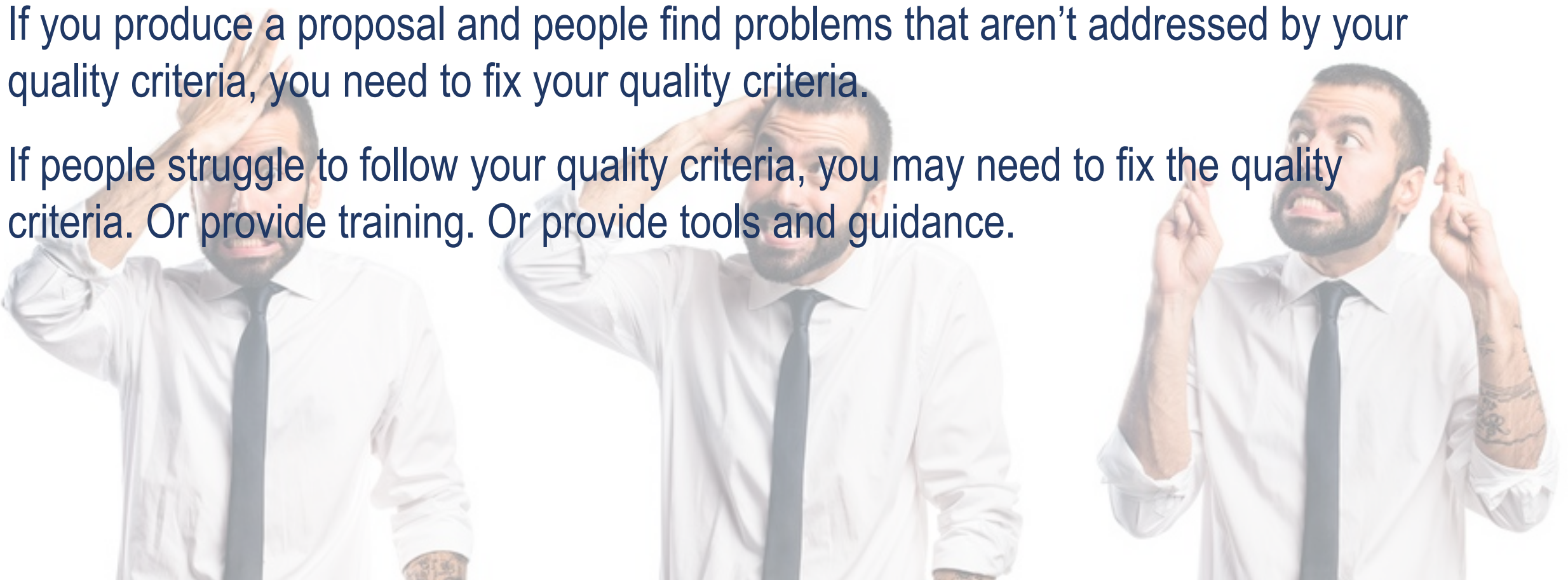
If you produce a proposal with problems and your quality criteria enable you to steer it back on track, you've got good quality criteria.

## Section 3 • Proposal Quality Validation

# How to tell if you need **to fix** your quality criteria

If you produce a proposal and people find problems that aren't addressed by your quality criteria, you need to fix your quality criteria.

If people struggle to follow your quality criteria, you may need to fix the quality criteria. Or provide training. Or provide tools and guidance.



## Section 3 • Proposal Quality Validation

If you have any **preventable** problems, you can add or change quality criteria to address them.

Now you have a way to take action on them, without re-writing your process.

# Closing remarks

- A little quality goes a long way. But only if it's real.
- Feel free to ask questions and get clarifications by emailing: [carl.dickson@captureplanning.com](mailto:carl.dickson@captureplanning.com)
- If you want to delve into the implementation details, visit PropLIBRARY (<https://proplibrary.com>)